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Poland

Exporter Guide

Annual

2001

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Report Highlights:
Food and beverage purchases accounted for 30 percent of total consumer spending in CY 2000, among Poland's 38 million population. While CY 2000 GDP growth is expected to slow to 2%, consumers are still demanding a bigger variety of products. This guide has been designed to assist exporters in identifying and taking advantage of opportunities for U.S. high value products in a changing market as Poland moves towards EU accession.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Warsaw [PL1], PL

Table of Contents:

Executive Summary

(UNTrade data is not available for 2000. As such, FAS-Warsaw has based the following analysis on the FAS Trade reports as well as Polish Trade Data for U.S. Exports of Agricultural, Fish & Forestry Products to Poland for the analysis.)

The retail food industry has experienced the most dynamic growth among all sectors of the economy since free-market restructuring and privatization began in 1989. Agricultural products like snacks, beverages, fast food and ice cream oriented toward young consumers below age 19, will remain in high demand as this age group comprises 27 percent of the total population. Food and beverage purchases accounted for 30 percent of total consumer spending in CY 2000.

Poland's GDP growth of 4.0 percent in CY 2000 was down slightly from 4.1 percent in CY 1999. Experts estimate CY 2001 GDP growth will be significantly lower at only 2.0 percent. Inflation in CY 2000 reached 10 percent, up from 7 percent in 1999. Unemployment reached 15 percent in December of 2000 and is on the rise reaching 15.8 percent in June 2001. Total exports in 2000 are valued at $28.3 billion, up $2 billion from last year, and above the pre-Russia financial market collapse level, $27.3 billion in 1997. Imports in CY 2000 were valued at $41.4 billion, increasing less than a billion dollars from 1999. However, imports are expected to outpace increases in exports over the next couple of years.

The agriculture sector experienced an overall output decrease of 5.7 percent in Marketing Year 2000. Crop production dropped 5.8 percent due to drought conditions. Livestock production also decreased 5.5 percent, mainly due to increased feed costs caused by drought conditions, and reduced demand because of BSE and FMD consumer concerns. Lower harvests occurred in all grains and oilseeds, while potatoes and sugar beets recorded production increases. Estimates for MY 2001 show recovery in grains to meet domestic demand, despite flooding in July of 2001.

The negative agricultural trade balance for CY 2000 amounted to $532 million with imports valued at $3.2 billion, and exports at $2.7 billion. Imports and exports both decreased from CY 1999, however trade deficit in the year improved from the $706 million level the previous year. The EU continues to be the largest supplier of agricultural products to Poland (51 percent) and the largest market for Polish agricultural exports (49 percent).

Total US agriculture exports to Poland in CY 1999 amounted to $130 million, decreasing sharply in CY 2000 to $80 million. Leading the U.S. agricultural exports in 2000 was poultry meat ($25 million) followed by: dairy products ($5.8 million), frozen or chilled red meat ($5.6 million), processed fruits and vegetables ($2.4 million). Substantial decreases in the value of U.S. exports of red meat to Poland fell a significant 50 percent and hides and skins were also off by 55 percent. The value of U.S. exports of peanuts and tree nuts increased substantially by 330 percent and 250 percent respectively.

A new agricultural "zero-zero" tariff trade agreement between Poland and the EU became effective January 1, 2001 and will continue to reshape Poland's agricultural trade. The agreement has fully liberalized the import of over 475 commodities from the EU to Poland. Given the tariff rates on US products, product origin and brand name emphasis in marketing will become even more critical in introducing or maintaining market-share.

I. Market Overview

A weak zloty on the foreign market, aiding exports, coupled with a record Foreign Direct Investment (FDI) inflow into the economy valued at USD 10.6 bln, helped maintain the CY 2000 GDP level at a 4.0 percent annual increase. However, the global increase in raw material costs, mainly oil, has been a major contributing factor to an increasing current account deficit. This coupled with a global economic slowdown translates into an estimated budget deficit at 4 percent of CY 2001 GDP, almost double the three-year average of 2.2 percent. An aggressive monetary policy, a weakening global economy and a decrease in privatization tenders of state entities is expected to result in an estimated 2.0 percent annual GDP growth for 2001.

Foreign firms have invested close to $50 billion dollars in Poland over the last decade, with the highest annual amount estimated at $10.6 billion recorded in CY 2000. The Polish Agency for Foreign Investment (PAIZ) indicates 44,229 firms in CY 2000 had foreign capital participation, representing 11.6 percent of total firms in Poland. In CY 2001, Foreign Direct Investment is expected to decrease to $6-8 billion due to a decrease in privatization tenders of state entities and low macro-economic indicators, i.e. expected 2.0 percent GDP growth for CY 2001. A recent trend shows increased participation in exports by foreign invested firms, aiding total CY 2000 export growth to reach 15.5 percent. According to the Organization of Economic Cooperation and Development (OECD), medium and low-technology sectors have contributed to this export growth in exports, lead by the food industry.

The largest foreign investors in the Polish food industry are: Reemtsma (tobacco processing), Coca-Cola, Phillip Morris (tobacco processing), Nestle, and Harbin (brewery).

Significant policy changes have been taking place in light of free-market economy restructuring, including:

January 1, 1999 marked a new decentralization in government decision-making and administration, reducing the number of voivodships (provinces) to 16 (49 previously) and expanding powers of the three tiers in lower government; voivodships, county, commune.

The new commercial company code, business activity law, and National Court Register Act passed at the beginning of CY 2001 were promulgated by the Government to create equality in treatment between foreign and domestic investors.

A new regulatory property tax will become effective in 2002 affecting business entities and owners of private land. Investors should note that, despite strong lobbying, businesses operating in Special Economic Zones (SSE) will also be required to pay a property tax.

Market indicators:

- Poland's population of 38.7 million is relatively dispersed. Although 61.8 percent of the population can be classified as urban, only 21.8 percent reside in cities of over 200,000 inhabitants. The population is very young with over half under the age of 40. Children under the age of 15 make up 21 percent of the population (8.2 million).

- Average monthly gross income per capita is USD 481.

- The household consumption expenditure rate in CY 2000 grew 2.6 percent from CY 1999 (prices constant). From 1994-1999 the average annual growth rate in expenditures on household consumption was 5.4 percent.

- In 2000, food and non-alcoholic beverages accounted for 30 percent of household expenditures.

- Real gross average income between CY 1999 and CY 2000 increased 1.9 percent compared to a 4.7 percent increase from CY 1998 to CY 1999. However, the real average monthly disposable household income in 2000 decreased slightly to $121.75 from $126.36 in 1999. This slight decrease in average real disposable income is due to an increase in utility costs of households. (Employed and self-employed households' disposable incomes were higher; 20 percent of household income goes to pay utilities).

- Unemployment continues to plague Poland with the figure reaching 15 percent at the end of 2000 and still on the rise (15.8 percent June 2001). The young in the 18-24 age bracket constitute 30 percent of the total jobless workforce.

- Of the approximately 15.6 million people employed in Poland, 27.5 percent work in the public sector and the remaining 72.5 percent represent the private sector. The workforce is diversified with 32 percent of woman working (this percentage could slightly decrease due to an increase in the overall unemployment rate during 2001/2002 period).

- Approximately 28 percent of the population work directly in the agriculture, forestry and fishing sectors.

- A trend in smaller families is becoming more apparent in Poland's 12.5 million households, 63 percent house three persons or less.

SUPPLIER STRENGTHS/WEAKNESSES - MARKET OPPORTUNITIES AND COMPETITIVE THREATS

Advantages	Challenges
Central Europe's most populous country with domestic consumer market of nearly 40 million people.	Distance from the U.S. Hence higher transportation costs versus the European suppliers.
A strategic location within a dense, major international market. Offering re-export potential.	Complicated system of product registration in some cases delaying or even preventing the product from entering the Polish market.
Country continuously moving towards open market economy.	EU Association Agreement as well as certain free trade agreements signed by Poland put products originating from the U.S. at a disadvantage.
A very productive, young and skilled labor force. Potential for finding trading partners and favorable conditions for establishing joint ventures and local production.	Recent food recalls in the EU could potentially have a negative impact on Polish consumers view of imported products. GMO issues could damper imports of U.S. products as well.
Polish consumers associate U.S. products with good quality.	Protective measures by the Polish government of its industries through higher tariffs and lower quotas.
Market niches exists in semi-ready food products - i.e. microwavable products.	Relatively high value of the U.S. dollar against the Polish Zloty.

II. Exporter Business Tips

Local Business Customs/Practices

- It is customary for business people in Poland to shake hands upon meeting. An American businesswomen should not be surprised if a Polish business man kisses her hand upon meeting or saying goodbye, however, it is not necessary for American businessmen to kiss the hand of Polish businesswomen.

- Business cards are the norm in Poland and are generally given to each person at a meeting. U.S. visitors should bring plenty of business cards to a meeting. Cards printed in Polish aren't necessary.

- Business attire is formal, including a suit and tie for men and a suit or dress for a women. Casual wear is suitable for informal occasions but more formal dress is usually customary for visiting or entertainment in the evening.

Consumer Tastes and Preferences

The issues of BSE and FMD along with GMO issues have more Polish consumers concerned about the safety of the food in their own country along with the imports of food from other countries. Until recently, Polish consumers did not focus on these issues and their concern has still not reached the level of their western European counterparts. However, this is not to say that the concern for food safety among Polish consumers is non-existent.

- Due to the difficult economic situation for many Polish families, 88 percent of Poles being price-sensitive, many shops provide a relatively large variety of low-cost products and few high end products.

- Consumers do consider expiration dates and Polish norms for products.

- Advertising in Poland is crucial. Television is believed to be the best medium in Poland, with products advertised through television promotions showing the greatest sales growth of all advertised products. Forty-two percent of students' purchasing decisions are influenced by advertising.

- Promotions on products influence the purchases of 50 percent of adult Poles.

It is estimated that only 5 percent of the Polish population can be considered rich while 20-25 percent constitutes the emerging middle class. The remaining 65-70 percent is considered poor or with little purchasing power. The urban population (62 percent) has a much higher level of purchasing power compared to the rural population.

Buyer Customs and Preferences

- A recent trend indicates improvement in the consumers' image of Polish produced products compared to Western imported products. Although country origin is not as influential on purchasing decisions as previous years; youth, people with higher education, and owners of companies tend to prefer western products. Products originating from the U.S. are especially favoured by Polish customers.

- Although becoming more liberal, Polish buyers generally prefer not to make a purchase until he/she has met with the seller face-to-face. Transactions are usually on term payments (extended), but prepayments are also accepted; i.e. at the onset of cooperation.

- With limited access to capital and high interest rates, Polish buyers seldom purchase products at an initial meeting and prefer to discuss the product's technical parameters before negotiating price.

- Many companies with foreign participation have invested in human capital which has improved contract negotiation processes. However, the decision process by most Polish firms is lengthy; going through rounds of negotiations along with arranging financing before making a final decision.

‘ Many of the U.S. companies in Poland formed joint ventures with Polish companies which handle the trade but share the risks and rewards.

‘ Since the early 1990's, the popularity of trade fairs in Poland has evolved into a full year’s schedule. Many companies utilize these fairs to introduce and demonstrate their products.

Food Standards/Regulations and Import/Inspection Procedures

The Polish government protects consumers in a variety of ways. It is essential for the products to be accompanied by the required documentation. A variety of licences, permits and special health certificates are required for agricultural products. Products not meeting these requirements will be detained at the Polish boarder and will be refused entry to the Polish market. Although the lack of proper labels or documentation can, in most cases, be corrected, it is a costly procedure and requires time. This puts products with a short shelf life in a dangerous situation.
Effective July 15, 1994 based on the Journal of Law no. 86 chapter 402, all packaged/canned food products for retail distribution are required to have Polish language labels. Multi-language labels are acceptable as long as they include Polish language. Labels must contain the following information:

- name of the product
- name and address of the producer
- date best before - the Polish phrase "najlepiej spozyc przed terminem XXX"
is most commonly used
- net content (weight/capacity)
- content of the product (ingredients, chemical additives etc.)

At of end of 2000, regulations from 1994-1997 concerning the labeling of alcoholic products started to be implemented, (Dziennik Ustaw no. 124 pos 783, dtd. Oct. 13,1997, Polska Norma N-A-79122 - Wino gronowe, Dziennik Ustaw 86 pos 402, July 15 1994). These regulation require that all imported bottled alcoholic beverages must have Polish language labeling.

Labels must contain the following information:

- name of the product (e.g. variety of wine) - name and address of the producer
- name and address of importer
- net content (capacity in Liters)
- alcohol content in %

Labeling must be applied in the form of a whole label or a permanent sticker before the product can enter Poland. More information on food standards and regulations along with general import and inspection procedures can be found in the latest FAS/Warsaw report on Poland- “Food and Agricultural Import Regulations and Standards”; online: www.fas.usda.gov -attache reports.

Polish Norms

In addition to the proper import documentation, phyto-sanitary or veterinary certificates, all food and agricultural products entering the Polish market, or even for transhipment, must comply with the relevant quality and production standards. Norms are set by the Polish Committee on Norms. However, each Polish ministry issues separate regulations which pertain to specific norms. For example, the norms may refer to temperature requirements for storage or sampling requirements for residues or pesticides. Exporters are advised to check with importers to ensure that all exported products are in compliance with these norms.

Poland's Ministry of Health and Social Welfare published new regulations (Dziennik Ustaw no. 9 pos. 72) concerning food additives on February 5, 2001. Poland uses a positive-additives list, which identifies additives that are permitted for use in foodstuffs. This particular regulation has been one of the most difficult obstacles facing imported products. The new list is much more compatible with the current EU regulations. The changes constitute a big step forward in modernizing the Polish regulations and enable the importation of many products currently not present on the Polish market.

For additional information, exporters should refer to the Post Country Market Brief on Polish Norms which is available via the internet at the following Web site: www.fas.usda.gov - attache reports directory.

III. Market Sector Structure and Trends

Wholesale Sector

The wholesale market has changed over the last several years including consolidation, strengthening of large buyers, companies with national coverage, and a strengthening of ties between wholesaler and retailer.

Poland’s wholesale market structure has five categories: national chains, regional chains, regional wholesalers, local wholesalers, and buying groups (consisting of regional chains and regional wholesalers).

- The national chains, the least numerous group, operate several branches throughout Poland with central management.
- The regional chains have grown through the purchasing of bankrupt firms. They are territorial, usually in several voivodships, and supply mainly retailers.
- Regional wholesalers have a strong presence in local markets offering a wide range of products and improved service.
- Local wholesalers are feeling the pressure of the larger firms in the industry and mainly deal in cash and carry.
- Buyer groups operate in several market segments and are increasing their integration

with many retailers.

- The larger businesses in this sector are firms with foreign or mixed capital. The largest is the Macro Cash and Carry formerly Dutch-owned but purchased by German Metro in 1997. Macro is followed by Eurocash JMB Polska (Portugese capital), Milo and McClane International (USA).

The fourth largest wholesaler on the Polish market is McClane International, formerly ABCO. ABCO was previously owned by R.J. Reynolds and was purchased by McClane International, which has headquarters in Temple, Texas. McClane International has been working closely with ABCO for the past several years prior to the acquisition. Appearance of this U.S. investor on the Polish market could enable U.S. exporters to have an easier access to the Polish market.

In order to get specific information on the Polish wholesale market and its potential for processed U.S. products McClane Polska can be contacted at the following address:

Mr. Bill Bishop
President
Ms. Dorota Skorupska
Purchasing Director
Distribution Center - Blonie
McClane Polska (former ABCO)
ul. Pas 20C
05-870 Blonie
ph/fax: 4822-7310200, 7310260
fax: 4822-7310299
email: dorota.skorupska@maclane.pl

Retail Sector

The distribution system for consumer ready food products, as with all other branches of the Polish economy, is still undergoing a rapid transformation. It should be noted that despite many obstacles (e.g., high cost of credit, high store rents, late payments from retailers), it remains one of the most active areas of the Polish economy. The distribution system for consumer ready products in Poland is very diversified. It ranges from small family operated stores, through medium sized stores to big western style distribution centers.

- Foreign investors are very active in retailing. There are now over 100 hypermarkets nationwide along with many super-stores.

- Over the past five years the number of stores with foreign capital has increased from 330 to 950.

- According to Polish analysts big retailing chains will gain control of as much as 80 % of the Polish market within the next five years.

For more information on the Polish retail sector refer to Post Country report on Retail Food Sector, which is available via Internet at the following web site: www.fas.usda.gov - in attache report directory.

Food Processing Sector

Results of 2000 production show that the most dynamically growing sector of the food processing industry are products such as beverages, fruit juices and drinks, confectionary, food concentrates, oils and margarine, processed poultry, cheeses, milk drinks and beer. The proportion of food industry products considered to be "value added" is constantly increasing.

For more detailed information on Poland's processing sector refer to Post Country report on Food Processing Sector, which is available via Internet at the following web site: www.fas.usda.gov - attache reports directory.

Hotel, Restaurant & Institutional Sector

Until the early 1990s, the Polish hotel and restaurant sector was dominated by the state-owned company, "Orbis". Transition to a market economy saw the emergence of many new private hotels and restaurants. Poland's population of nearly 40 million people along with nearly 88 million visitors each year has maintained steady demand for this growing sector.

- With more Poles working longer hours, Polish eating habits have also been altered and eating out is not uncommon any more.

- Besides favoring traditional Polish cuisine; Poles like international cuisine. Italian, Chinese, Mexican and Indian restaurants can be found in almost any Polish city.

- American chains have also started to appear in larger cities like Warsaw e.g. T.G.I. Friday's and Champions, besides Mc Donald's, Pizza Hut, and KFC.

- Currently many of the international hotel chains such as the Marriott Hotel, Sheraton, Hyatt, Holiday Inn are present in larger Polish cities. Many local entrepreneurs have also invested in this sector.

- The catering sector has only been developing in Poland since early 1990s. HRI is one of the fastest growing branches of the Polish industry.

Several of the larger producers have set up separate distribution channels especially for this sector. While all the other sectors of Polish food distribution are already very competitive HRI is probably one of the few existing market niches which, if supported with the proper promotion campaign, could offer U.S. exporters a chance to enter into the Polish market.

For more detailed information on Poland's HRI Food sector please refer to Post Country report on Hotel, Restaurant & Institutional Food Service Sector Report, which is available via Internet at the following web site: www.fas.usda.gov - attache reports directory.

IV. Best High-Value Product Prospects

Food/Edible Fishery Products	**Food/Edible Fishery Products**
Poultry Meat	Almonds (Shelled)
Red Meat	Peanuts
Beef Offal	Dried Prunes
Processed Fruits & Vegetables	Dried Raisins
Wine & Beer	Fruit and Vegetable Juices
Pet Foods	Salmon
Fresh Fruit	Snack Foods

V. Key Contacts and Further Information

U.S. EMBASSY TRADE PERSONNEL

Organization	Contact Name	Address	Phone/Fax
Foreign	Wayne Molstad, Counselor	American Embassy	4822-621-3926/

Agricultural Service	Al. Ujazdowskie 29/31 4822-628-1172 00-540 Warsaw, Poland E-mail: agwarsaw@fas.usda.gov Web page: www.usaemb.pl\usfas\front.htm

U.S. BASED MULTIPLIERS RELEVANT FOR POLAND

Organization	Contact Name	Address	Phone	Fax
Polish-U.S. Economic Council U.S. Chamber of Commerce	Mr. Garry Litman Poland, Central Europe Int. Division	1615 H Street, NW Washington DC 20062-2000	(202) 4635482	(202) 4633114 e-mail: eurasia@uschamber.com

POLAND GOVERNMENT AGENCIES

Organization	Contact Name	Address	Phone	Fax
Ministry of Agriculture and Rural Development	Mr. Artur Balazs Minister	ul.Wspolna 30 00-930 Warsaw	(4822) 6285745	(4822) 6292894
Ministry of Agriculture and Rural Development	Mr. Robert Stepien Department of Foreign Cooperation	ul.Wspolna 30 00-930 Warsaw	(4822) 6282351	(4822) 6212326
Ministry of Health	Ms. Minister	ul. Miodowa 15 Warsaw	(4822) 8312324	(4822) 6358852
Ministry of Health	Ms. Janina Stefanska Director Public Health Department	ul.Miodowa 15 Warsaw	(4822) 8261521	(4822) 6358852

Ministry of Environment Protection Natural Resources and Forestry	Mr. Janusz Radziejowski Under Secretary of State Nature Conservation	ul.Wawelska 52/54 00-922 Warsaw	(4822) 5792673	(4822) 5792555
Ministry of Environmental Protection Natural Resources and Forestry	Dr. Zygmunt Krzeminski Director Forestry, Nature Protection and Landscape Creation (GMO)	ul.Wawelska 52/54 00-922 Warsaw	(4822) 5792673	(4822) 5792555
Ministry of Environmental Protection Natural Resources and Forestry	Dr. Jacek Jaskiewicz Deputy Director Department of International Cooperation	ul.Wwelska 52/54 00-922 Warsaw	(4822) 8258829	(4822) 8253972
The Agricultural State Property Agency	Dr. Miroslaw Helta Director	Plac Bankowy 2, Room 810 Warsaw	(4822) 6351000	(4822)
Ministry of Economy	Mr. Tadeusz Lisek Department of Foreign Economic Relations	Plac Trzech Krzyzy 5 Warsaw	(4822) 6935955	(4822) 6219714
Polish Center for Research and Certification	Mr. Janusz Berdowski Director	ul.Klobucka 23a 02-699 Warsaw	(4822) 6470742	(4822) 6471222
Polish Agency For Foreign Investment	Mr. Piotr Dabrowski	Aleja Roz 2 00-559 Warsaw	(4822) 6216261 6210706	(4822) 6218427

POLAND TRADE INSTITUTES/ASSOCIATIONS/CHAMBER OF COMMERCE

Organization	Contact Name	Address	Phone	Fax
Agricultural Economy Institute	Prof. Augustyn Wos	ul.Swietokrzyska 20 Warsaw	(4822) 8265031	(4822) 8271960

Plant Protection Institute	Prof. Stefan Pruszynski Director	ul.Miczurina 20 60-318 Poznan	(4861) 8649027	(4861) 8676301
Institute of Natural Fibre	Mr. Ryszard Kozlowski Director	ul.Wojska Polskiego 71B 60-630 Poznan	(4861) 8224815 8480061	(4861) 8417830 tlx 0413486
American Polish Home Builders Institute Foundation	Mr. Eligiusz Koniarek Director	ul.Chmielna 54/57 80-748 Gdansk	(4858) 3016851	(4858)301421 7
Polish Economic Chamber of Wood Industry	Mr. Kazimierz Jablonski Chairman	ul.Ratajczaka 19 61-814 Poznan	(4861) 8537172	(4861) 8537025
National Chamber of Commerce of Poland	Mr. Andrzej Arendarski	ul.Trebacka 4 00-074 Warsaw	(4822) 8260221	(4822) 8274673
National Polish Chamber of Commerce of Furniture Manufactures	Mr. Maciej Formanowicz Chairman Mr. Adam Burda Director	ul. Grunwaldzka 104 60-307 Poznan	(48-61) 8673188	(48-61) 8673188
American Chamber of Commerce in Poland (AmCham)	Mr. Szymon Mlodenhawer Director	ul.Emilii Plater 53 00-113 Warsaw	(4822)5205999	(4822) 5205998
Institute of Wood Technology	Mr. Wladyslaw Strykowski	Ul.Winiarska 1 60-654 Poznan	(4861) 8224700	(4861) 8224372
Business Center Club	Mr. Marek Goliszewski President	Plac Zelaznej Bramy 2 00-136 Warsaw	(4822) 6253037	(4822) 6218420
Polish Bakers Association	Prof. Zygmunt Ambroziak President	ul.Krakowiakow 103 Warsaw	(4822) 462065 462066	(4822) 461275

National Millers Association	Ms. Jadwiga Rothkaehl Chairman	ul.Miodowa 14, room 303 00-246 Warsaw	(4822) 8311461 x. 307	(4822) 6063845
Polish Grain-Feed Chamber	Mr. Bogdan Judzinski Chairman, Mr. Jerzy Wojciechowski Deputy	ul.Obozna 7 m 64 00-845 Warsaw	(4822) 8281475 cellular (48) 608445612	(4822) 8281476
Polish Association of Grain and Oilseeds Producers	Mr. Aleksander Szymanski	ul.Zurawia 22, room 102 00-515 Warsaw	(4822) 6220667 6291071	(4822) 6220667 6291071
National Association of Fish Producers	Mr. Zdzislaw Sobecki	ul.M.Kopernika 34 00-336 Warsaw	(4822) 8277421	(4822) 8277421
Polish Association of Swine Producers	Mr. Edmund Lozynski	ul.Siewierska 13 02-360 Warsaw	(4822) 8222723	(4822) 8220063
Polish Producers, Exporters and Importers of Meat	Mr. Stanislaw Zieba	ul.T.Chalubinski e-go 8 02-784 Warsaw	(4822) 8302656 8301664	(4822) 8302582
Polish Association of Producers of Agricultural Commodities	Mr.Jacek Kalinski	ul.Wspolna 30 00-930 Warsaw	(4822) 6232413	(4822) 6232357
National Association of Tobacco Industry	Mr. Sloma General Director	ul. Kasprzaka 29/31 01-234 Warsaw	(4822) 8360614 8366241	(4822) 8360614
National Association of Orchard Owners	Mr. Romuald Ozimek	ul.Warecka 11A 00-034 Warsaw	(4822) 8265281 ext. 382	(4822) 8265281
Polish Homebuilders Association	Mr. Jacek Dabrowski President	ul.Chmielna 54/57 80-748 Gdansk	(4858) 3016851	(4858) 3014217
Corporation of Construction Enterprises	Mr. Jan Mikoluszko President	ul.Kochanowski e-go 39 01-847 Warsaw	(4822) 6634857	(4822) 6634857

Polish Association of Sanitary, Heating, Gas and Air Conditioning Enterprises	Mr. Tomasz Malowany Director	ul.Sniadeckich 10 00-656 Warsaw	(4822) 6287582	(4822) 6287582
Polish Franchise Association (PFA)	Ms. Jolanta Kramarz President	ul.Koszykowa 54/138 00-659 Warsaw	(4822) 6308425	(4822) 6308467
Association of Leasing Companies in Poland	Mr. Andrzej Plochocki Director	ul.Filtrowa 71a /Apt. 3 02-055 Warsaw	(4822) 8251943	(4822) 8251943
Packaging Materials and Packaging Manufactures Association	Mr. Tadeusz Romanowicz President	ul.Czackiego 3/5 00-950 Warsaw	(48212) 8282715 8286426 7731932	(4822) 8286426 7731932
Pro-Marka Polish Association of Branded goods Producers (PABGP) E.Wedel S.A.	MR. Zbigniew Wrobel Chairman	ul.Zamojskiego 28/30 03-801 Warsaw	(4822) 6707511 6707070	(4822) 6707071
Direct Marketing Association	Mr. Andrzej Miekus President	ul.Marszalko-wska 87/85 00-683 Warsaw	(4822) 6280260	(4822) 6280260
Polish Chamber of Tourism	Mr. Wlodzimierz Sukiennik President	Al. Jana Pawla II 20 00-094 Warsaw	(4822) 6209049	(4822) 6209049
Polish Economic Chamber	Mr. Andrzej Arendarski President	ul.Trebacka 4 00-074 Warsaw	(4822) 6309600	(4822) 8274673
Warsaw Economic Chamber	Mr. Mieczyslaw Jakubowski President	ul.Nowowiejska 22/24 00-665 Warsaw	(4822) 6605458 6212972	(4822) 6212972
The National Chamber of Construction	Mr. Witold Zaraska President	ul.Zielna 49 00-108 Warsaw	(4822) 6207082 6207083	(4822) 8242172

Importers'and Exporters' Economic Chamber	Mr. Witold Rebak President	ul.Lucka 11 00-842 Warsaw	(4822) 6563350	(4822) 6253600
The National Packages Chamber	Mr. Jan Lekszycki President	ul.Konstancinska 11 02-942 Warsaw	(4822) 8422011	(4822) 8422303
The All-Polish Economic Chamber of Meat	Mr. Marian Burek President	ul.Chocimska 28 Pek-POL , room 309, 00-791 Warsaw	(4822) 8497968	(4822) 8498338
The All-Polish Industrial and Commercial Chamber of Private Investors	Mr. Jerzy Rzymanek President	ul.Widok 12 00-023 Warsaw	(4822) 8275474 8274858	(4822) 8277788
The Polish Economic Chamber of Agricultural Producers and Exporters	Mr. Slawomir Niewiadomski President	ul.Swietokrzyska 20, room 508 00-002 Warsaw	(4822) 8262261 ext. 555 8260215	(4822) 8260215
Development and Environment Chamber	Mr. Zygfryd Nowak President	ul.Chmielna 15 00-021 Warsaw	(4822) 8270063	(4822) 8270063
The Federation of Associations Technical & Scientific Research	Mr. Andrzej Zielinski President	ul.T. Czackiego 3/5 00-950 Warsaw	(4822) 8277888 8268731	(4822) 8272949
Polish Construction Chamber of Industry and Commerce in Warsaw	Mr. Eugeniusz Budny President	ul.Wspolna 2 00-926 Warsaw	(4822) 210351 ext. 737,282 6283528	(4822) 6283528

The Craftman's and Small Enterprise Chamber in Warsaw	Mr. Boguslaw Wojcik President	ul.Smocza 27 01-048 Warsaw	(4822) 383211 380351 381610	(4822) 383553
The Polish Economic Chamber of Motor-car Transport And Forwarding	Mr. Krzysztof Gutowski President	Al.Jerozolimskie 144, room 8 02-305 Warsaw	(4822) 8224811 ext. 204 8236872	(4822) 8236872
The Polish Union of Gelatin and Gelatine Products Producers and Processors	Mr. Kazimierz Grabek President	Plac Grzybowski 12/16 00-104 Warsaw	(4822) 6241067 6241135	(4822) 6242238
The Polish Union of Producers, Exporters and Importers of Meat	Mr. Witold Pereta President	ul.T. Chalubin-skiego 8 00-613 Warsaw	(4822) 8300734 8301665 8302670	(4822) 8302675
The Producers and Consumers Association of Packing Materials and "PROPAK" Packages	Mr.Tadeusz Romanowicz President	Ul.T. Czackiego 3/5 00-950 Warsaw	(4822) 8267461 ext. 211 6226426	(4822) 6328975 7731932
The Scientific Society of Organizations and Management (The Main Board)	Mr. Stanislaw Rakowicz President	ul.Koszykowa 6 00-564 Warsaw	(4822) 6299973 6254485 6292127	(4822) 6292127
The Society Supporting Economic Initiatives	Mr. Krzysztof Czeszejko-Sochacki	ul.Krucza 38/42 00-521 Warsaw	(4822) 6290483 6290651	(4822) 6290651
Foreign Investors Chamber of Industry and Commerce	Director	Krakowskie Przedmiescie 47/51 00-071 Warsaw	(4822) 8272234 8260570	(4822) 8272234

Trade Shows in Poland:

Warsaw Agricultural Trade Office recommends the following two trade fairs organized in Poland:

Polagra-Food: One of the largest food fairs in central/eastern Europe, organized in Poznan every year. As of 2001, Polagra is being organized as two separate trade fairs Polagra - Food (food products, ingredients) organized in September and Polagra Farm (agricultural machinery and farm supplies) organized in October. The following attendance/exhibition data pertains to the last Polagra-Food show organized in 2001.

During the 2001 show, Polagra-Food hosted about 944 exhibitors including foreign exhibitors from 34 countries. The Fair attracted about 37,000 visitors. Please note that the show is closed to the general public during the first two days when it is reserved for business visitors only. Exhibitors range from firms trading/producing food products, ingredients, to food processing and packing equipment.

FAS/Warsaw is planning to organize a U.S. exposition at Polagra-Food Fairs during 2002 and 2003. Post will promote the show working together with the USDA's Trade Show Office to encourage FAS cooperators and U.S. food companies to participate with their own stands at Polagra-Food.

Show dates:
Polagra Food - September 10-13, 2002
September 16-19, 2003
Polagra Farm - October 10-13, 2002
October 9-12, 2003

Organizer:
Ms. Jadwiga Chlapowska
Manager Project team b-1
ul. Glogowska 14
60-734 Poznan
ph: 4861-8692592, 8692303
fax: 4861-8660675, 8665827

Polfish: Largest fish and fish products fair in Poland and central/eastern Europe attracting various companies from the fish industry - fishing companies, importers-exporters, wholesalers, retailers, transportation companies as well as consulting firms. 2001 edition hosted 140 firms - 100 polish, 40 foreign. Fair was visited by about 4,000 visitors (mostly professional, versus general public which usually also visits agricultural fairs).

Show dates:
- organized every year
Next show June 2003

Organizer:
International Gdansk Fair
Ms. Anna Lasocinska
Polfish Coordinator
ul. Beniowskiego 5
80-382 Gdansk
ph: 4858-5549117, 5520071-6
fax: 4858-5549207, 5522168

Other shows of interest:

Eurogastro: International Trade Fair - Everything for Gastronomy. International Fair to be organized for the 6th time in Warsaw. The largest fair attracting companies dealing within the HRI sector. The 2001 show attracted 179 exhibitors, including 26 foreign firms from 7 countries. Area of exposition amounted to 4,332 sqm. This show attracts HRI buyers but is also open to the public.

Exhibitors included firms dealing in: technical devices, accessories, food products, non-alcoholic beverages, alcoholic drinks, condiments, services and furniture.

Dates:

March 21-23, 2002
March 2003

Organizer:

Miedzynarodowe Targi -Polska Sp.z.o.o.
ul. Koszykowa 24/12
00-553 Warsaw
ph: 4822-6223179, 6223180
fax:4822-6223176, 6225789
e-mail: mtpolska@mtpolska.com.pl
Http://www.mtppolska.com.pl

Polfood: Agricultural Fair in Gdansk. Over 400 exhibitors, (including 60 from abroad during the 2000 edition), the show attracts about 20,000 visitors. Exhibitors range from firms trading/producing food products, ingredients for industry and agricultural machinery.

Show dates:
end of May 2002

Organizer:
International Gdansk Fair
ul. Beniowskiego 5
80-382 Gdansk
ph: 4858-5549200
fax: 4858-5522243

Krakfood: organized in Krakow every year. Over 164 exhibitors, including 65 from abroad, the show attracts about 12,500 visitors. Exhibitors range from firms trading/producing food products and wholesalers.

Show dates:
March 2002

Organizer:
Krakow expo center - together with Hungarian International Fairs
ul. Basztowa 23/4
31-156 Krakow
Ph: 4812-6385656
fax: 4812-6386151

National Livestock Show: Largest livestock exposition in Poland. Located in Warsaw. Organized annually or alternative years. The show attracts about 430 exhibitors, utilizing exposition area of 7,000 square meters.

Show dates:
August 2002

Organizers:
Ministry of Agriculture
and Rural Development
Trade Show Department
ul. Wspolna 30
00-930 Warsaw
ph/fax: 4822-6288784

APPENDIX 1. STATISTICS

A. KEY TRADE & DEMOGRAPHIC INFORMATION

Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%)[1/]	3,981*/3%*
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)[1/]	1,577*/2%*
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)[1/]	251*/0.53%*
Total Population (Millions)/Annual Growth Rate (%)	38.7/0.8%
Urban Population (Millions)/Annual Growth Rate (%)	23.9/1-2%
Number of Major Metropolitan Areas [2/]	1
Size of the Middle Class(Millions)/Growth Rate (%)[3/]	4/1-2%
Per Capita Gross Domestic Product (U.S. Dollars)	4,082
Unemployment Rate (%)	15%
Per Capita Food Expenditures (U.S. Dollars)	950
% of Female Population Employed[4/]	30%
Exchange Rate (US$1 = X.XX zl)[5/]	4.00

[1]/ Use FAS' Web-enabled UNTrade database (HS 6-digit option; Import Market Share BICO 3-year format) (*1999 Data)
[2]/ Population in excess of 1,000,000.
[3/] These are unofficial estimates due to the level of equality of incomes among 95% of the pop'l. (For further information refer to section I)
[4/] Percent against total number of women (18-59 years old).
[5/] Note, if necessary, any significant exchange rate movements since the previous year.

Table B. Consumer Food & Edible Fishery Products (IN MILLIONS OF DOLLARS)	Imports from the World 1997	1998	1999	Imports from the U.S. 1997	1998	1999	U.S Market Share 1997	1998	1999
CONSUMER-ORIENTED AG TOTAL	1536	1665	1577	75	68	36	5	4	2
Snack Foods (Excl. Nuts)	121	117	103	1	1	1	1	1	0
Breakfast Cereals & Pancake Mix	5	7	5	1	0	0	1	0	0
Red Meats, Fresh/Chilled/Frozen	99	90	64	5	4	1	5	5	2
Red Meats, Prepared/Preserved	23	9	8	0	0	0	0	0	0
Poultry Meat	60	43	11	37	25	5	61	58	42
Dairy Products (Excl. Cheese)	70	88	111	2	3	0	4	3	0
Cheese	23	19	11	0	0	0	0	0	0
Eggs & Products	12	14	8	1	1	1	2	8	5
Fresh Fruit	299	393	400	2	2	3	1	0	1
Fresh Vegetables	80	99	77	1	1	1	0	0	0
Processed Fruit & Vegetables	139	145	122	8	9	6	6	6	5
Fruit & Vegetable Juices	51	66	83	1	2	2	3	2	2
Tree Nuts	30	30	27	1	3	3	4	9	9
Wine & Beer	59	70	86	1	2	2	2	2	3
Nursery Products & Cut Flowers	41	54	62	1	1	1	1	1	1
Pet Foods (Dog & Cat Food)	17	17	14	2	2	2	10	15	16
Other Consumer-Oriented Products	407	406	386	15	14	11	4	3	3
FISH & SEAFOOD PRODUCTS	254	325	251	1	1	1	1	0	1
Salmon	6	17	24	1	1	1	5	1	1
Surimi	51	52	40	0	0	1	0	0	0
Crustaceans	10	15	17	0	0	0	0	0	0
Groundfish & Flatfish	90	148	90	0	1	1	0	0	1
Molluscs	1	1	1	0	0	0	0	0	0
Other Fishery Products	96	92	79	1	1	1	1	0	0
AGRICULTURAL PRODUCTS TOTAL	3,954	3,931	3,381	216	186	113	5	5	3
AG. FISH & FORESTRY TOTAL	4,542	4,640	3,981	237	201	124	5	4	3

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Table C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products - POLAND IMPORTS

CONSUMER-ORIENTED AGRICULTURAL IMPORTS				FISH & SEAFOOD PRODUCTS			
($1,000)	1997	1998	1999	($1,000)	1997	1998	1999
Germany	175260	223552	227980	Norway	106889	114791	120398
Spain	113837	171770	170289	Russian Federa	35293	59373	34958
Netherlands	136969	151640	138116	China	2847	18465	15814
Italy	100985	104770	116435	Netherlands	5968	12153	14306
Ecuador	88074	66060	101216	Germany	16291	18091	12681
Hungary	86376	77453	92630	Ireland	12488	13484	9195
France	76338	72408	67514	Denmark	13587	15046	9170
Denmark	59170	75429	51253	Thailand	8685	9653	7963
Brazil	38680	42246	44854	Argentina	8850	5790	4379
Greece	30723	39501	44491	Spain	1717	3095	2534
United States	75303	68320	35683	Ukraine	295	2059	2322
United Kingdom	39931	39093	29488	United Kingdom	4752	8539	1925
Colombia	43495	51907	27600	Kazakhstan	0	1595	1389
Czech Republic	25483	26019	26990	United States	1295	1006	1321
Austria	20624	26629	26189	New Zealand	195	1877	1235
Other	424501	428383	376356	Other	34833	40235	11408
World	1535749	1665180	1577084	World	253985	325252	250998

Source: United Nations Statistics Division